**How To Input And Attach A Document
On A CMS Case
May 9, 2012**

Types of Cases

- There are 2 types of cases in Case Management System (CMS):
  - ✓ **System Generated Cases**
    - ✓ System Generated cases are opened based on a rejected transaction made by the field
    - ✓ Owned by DFAS Central Site
    - ✓ Field needs to attach documents as soon as the case is created
      - ✓ **Do not wait for Central Site to request the documents**
    - ✓ Cases closed incorrectly can be re-opened within 30 days of being closed
    - ✓ Cases cannot be Action Completed and Closed by the same user

  - ✓ **Manually Generated Cases**
    - ✓ Cases that are generated by the Field or Central Site (no reject transactions involved)
    - ✓ Owned by the organization who opened the case
    - ✓ The organization that opens the case closes the case

Enter SSN# and Case Type

--- Select Case Type ---
AT/ADT/ADSW
AWOL/DFR
Accession
Advance/Casual Pay
Allotment/Bonds
Assignment Incentive Pay
BA/IDT Pay
BAH
BAS
Bonus - CZTE
Bonus - Career Status
Bonus - Enlistment/Re-enlistment/Affiliation
Bonus - Professionals
Bonus --- Other
COLA/OCOLA
CZTE
Check Team
Clothing/Uniform Allowance
DFAS - Death Gratuity/Casualty/MIA
DFAS - Dependency Determinations
DFAS - Estimated Earnings
DFAS - Historical Records
DFAS - Medical Special Pay
DFAS - Payments Posting
DFAS - Travel
DFAS - UCX - Unemployment Compensation
DFAS - Verification
DFAS - W2 - Corrected
DFAS-CL Garnishment

Choose "Case Type" from drop down menu

Update/Request Status	Enter New Case	Bulk Load

Social Security Number (SSN): 444444444   Case Type: TSP

Enter New Case

Enter SSN# of Service Member

Click on "Enter New Case"

Case Types

- **There are currently 132 different case types to choose. Some examples are:**

  - ✓ BAH
  - ✓ Leave-Special Leave Accrual
  - ✓ PEBD / Years of Service
  - ✓ Other (this selection should only be used if there is not another selection that would describe the type of case)

- **Request to add a new case type should be sent to the CMS Team mailbox at cmsadmin@dfas.mil. The request should include the following:**
  - ✓ An explanation of the why it should be established
  - ✓ A description of when the case type should be used
  - ✓ All supporting documentation needed to work the case

Required Fields*

- **Member SSN**
- **Member last Name**
- **Member First Name**
- **Grade**
- **Description**
- **Category**
- **Root Cause**
- **Action/Comments**

Enter case description.
REQUIRED FIELD...

Case ID
0

Current Status
Referred (New)

Date Opened
04-18-2012

Currently Assigned to
System / Army / Active / Defense Military Pay Offices / 4

Description*

This is a TSP case on Mr. Doo Dee

Describe the issue in detail; be specific and clear. There is <u>no limitation</u> on the length of the description.

ADSN* 483600 **FID** **ACT-NO** **LRA-CD** **CATG** **SVC-ADSN*** 483600

Manual Pay ☐   **Deployed** ☐ **Root Cause**

Root Cause Other

Category* Process

Servicing Organization*

System / Army / Active / Defense Military Pay Offices / 48   Choose...

Case Type - TSP

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

The ADSN of the inputting Finance Office and the SVC-ADSN of the Finance Office that Maintains the Pay account will be pre-filled.

Case Info

Case ID	Current Status	Date Opened	Currently Assigned to
0	Referred (New)	04-18-2012	System / Army / Active / Defense Military Pay Offices / 48

Description*

This is a TSP case on Mr. Doo Dee

ADSN* 483600 **FID** [ ] ACT-IND [ ] **ERR-CD**

Manual Pay ☐

Root Cause Other

Category* Process ▾

Servicing Organization*

System / Army / Active / Defense Military Pay Offices / 48   Choose...

This is the Format ID field. This field is automatically filled from DJMS on AC ACCS Cases. **Do not fill when entering a Manual Case.**

Case Type - TSP

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

DFAS

Case Info

Case ID	Current Status	Date Opened	Currently Assigned to
0	Referred (New)	04-18-2012	System / Army / Active / Defense Military Pay Offices / 48

Description*

This is a TSP case on Mr. Doo Dee

ADSN* 483600 FID [ ] ACT-IND [ ] ERR-CD [ ] CATG

Manual Pay ☐   Deployed

Root Cause Other [ ]

Category* Process ▾

Servicing Organization*

System / Army / Active / Defense Military Pay Offices / 48 [Choose...]

This is the Action Indicator field. This field is automatically filled from DJMS on AC ACCS Cases. **Do not fill when entering a Manual Case.**

Case Type - TSP

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

Case Info

Case ID 0

Current Status Referred (New)

Date Opened 04-18-2012

Currently Assigned to System / Army / Active / Defense Military Pay Offices / 48

Description*

This is a TSP case on Mr. Doo Dee

ADSN* 483600 **FID** **ACT-IND** **ERR-CD** **CATG** **SVC-ADSN*** 48

Manual Pay ☐

Deployed ☐ **Root Cause**

Root Cause Other

Category* Process

Servicing Organization*

System / Army / Active / Defense Military Pay Offices / 48 [Choose...]

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

This is the Error Code field. This field is automatically filled from DJMS on AC ACCS Cases. Not all system generated cases will have an error code displayed. **Do not fill when entering a Manual Case.**

Manual Pay and Deployed Boxes

- **Manual Pay** is selected if the Service Member is manually paid
  - ✓ The CMS User will check this box <u>ONLY</u> if the service member is paid manually (does NOT have a DJMS pay account).

  - ✓ When an office accesses a service member in the pay system for the first time and the transaction rejects; the service member may be paid manually (if the accession has not been re-input into DJMS to create an account).

- **Deployed** is selected if the Service Member is deployed or will be deploying within 30 days. (This is not related to the status of the Service Member)

"Manual Pay" Box

Case Info

Case ID	Current Status	Date Opened	Currently Assigned to
0	Referred (New)	04-18-2012	System / Army / Active / Defense Military Pay Offices / 48

Description*

This is a TSP case on Mr. Doo Dee

ADSN* 483600 FID [ ] ACT-IND [ ] ERR-CD [ ] CATG [ ] SVC-ADSN* 483600

Manual Pay [ ]   Deployed [ ] Root Cause [▼]

Root Cause Other [   ]

Category* [Process ▼]

Servicing Organization*

System / Army / Active / Defense Military Pay Offices / 48 [Choose...]

Check this box if Service Member is paid manually.

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

"Deployed" Box

Case Info

Case ID	Current Status	Date Opened	Currently Assigned to
0	Referred (New)	04-18-2012	System / Army / Active / Defense Military Pay Offices / 48

Description*

This is a TSP case on Mr. Doo Dee

ADSN* 483600   FID [ ]   ACT-IND [ ]   ERR-CD [ ]   CATG [ ]   SVC-ADSN* 483600

Manual Pay ☐   Deployed ☐ Root Cause [_____▼]

Root Cause Other [_____]

Category* Process ▼

Servicing Organization*

System / Army / Active / Defense Military Pay Offices / 48   [Choose...]

Use IF the Thrift Savings Plan withholding is in error or it is being cred

Please attach TSP Form.

Check this box if the Service Member is deployed or will be deploying in 30 days.

Case Info

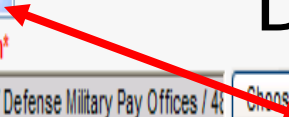|			
Case ID	Current Status	Date Opened	Currently Assigned to
0	Referred (New)	04-18-2012	System / Army / Active / Defense Military Pay Offices / 48

Description*

This is a TSP case on Mr. Doo Dee

ADSN* 483600   FID [ ]   ACT-IND [ ]   ERR-CD [ ]   CATG [ ]   SVC-ADSN* 483600

Manual Pay [ ]   Deployed [ ] Root Cause [▼]

Root Cause [   ]

Category* [Process ▼]

Servicing Organization*

System / Army / Active / Defense T...

Use IF the Thrift Savings Plan witho...

Please attach TSP Form.

Describes what caused the issue. This field is different from the case type. Use the drop down menu to select the most appropriate option. *REQUIRED FIELD....*

Root Cause

- Unknown
- Missing Documentation
- Case is Invalid
- CZTE Accountability
- DMPO Field Input Error
- DFAS Input Error

- Patient Accountability
- System Error
- System Interface Error
- Member Input Error
- Unit/Command Input Error
- Other

- **If you select "Other", you must describe what the cause is on the special field called "Root Cause Other".**

- Request to add a new root cause category should be sent to the CMS team at mailbox <u>cmsadmin@dfas.mil</u>. The request should include why a new root cause category is necessary.

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"Root Cause Other" Box

Case Info

Case ID: 0

Current Status: Referred (New)

Date Opened: 04-18-2012

Currently Assigned to: System / Army / Active / Defense Military Pay Offices / 48

Description*

This is a TSP case on Mr. Doo Dee

ADSN* 483600   FID [ ]   ACT-IND [ ]   ERR-CD [ ]   CATG [ ]   SVC-ADSN* 483600

Manual Pay [ ]   Deployed [ ]   Root Cause [▼]

Root Cause Other [   ]

Category* [Process ▼]

Servicing Organization*

System / Army / Active / Defense Military Pay Offices / 48   [Choose...]

This field is used if "Other" is selected as the root cause.

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

"Category" Box

Case Info

Case ID	Current Status	Date Opened	Currently Assigned to
0	Referred (New)	04-18-2012	System / Army / Active / Defense Military Pay Offices / 48

Description*

This is a TSP case on Mr. Doo Dee

ADSN* 483600   FID ___   ACT-IND ___   ERR-CD ___   CATG ___   SVC-ADSN* 483600

Manual Pay ☐   Deployed ☐   Root Cause _____

Root Cause Other _____

Category* Process ▾

Servicing Organization*

System / Army / Active / Defense Military Pay Offices / 48   Choose...

Use IF the Thrift Savings Plan withholding is in error or it is being cred...

Please attach TSP Form.

Drop down menu with three fields.
"Query", "Request",
"Problem", and "Process".
REQUIRED FIELD…

- Problem – When there is an error in the members pay that cannot be corrected at the organization creating the CMS case, you should use Problem.

- Process - Select if either an automated process or a work around caused the issue with the member's pay , you should use Process.

- Query – If a member has a question that cannot be answered on site and has to be referred to another organization, you should use Query.

- Request – If a specific action or fix is needed, you should use Request.

"Servicing Organization" Box

Case Info

Case ID: 0
Current Status: Referred (New)
Date Opened: 04-18-2012
Currently Assigned to: System / Army / Active / Defense Military Pay Offices / 48

Description*
This is a TSP case on Mr. Doo Dee

ADSN* 483600   FID   ACT-IND   ERR-CD   CATG   SVC-ADSN* 483600

Manual Pay ☐   Deployed ☐   Root Cause

Root Cause Other

Category* Process

Servicing Organization*
System / Army / Active / Defense Military Pay Offices / 48   Choose...

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

Servicing Organization
Is the same as SVC-ADSN.
REQUIRED FIELD...

"Case Type" Field

Case Info

Case ID: 0

Current Status: Referred (New)

Date Opened: 04-18-2012

Currently Assigned to: System / Army / Active / Defense Military Pay Offices / 48

Description*

This is a TSP case on Mr. Doo Dee

ADSN*: 483600   FID: ACT-IND: ERR-CD: CATG: SVC-ADSN*: 483600

Manual Pay ☐   Deployed ☐   Root Caus

Root Cause Other

Category*: Process

Servicing Organization*

System / Army / Active / Defense Military Pay Offices / 48   Choose...

System Pre-filled

Case Type - TSP

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

Documentation Attachment

Description may or may not apply to your specific case

Case Type - TSP

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

CMS will show an example of what documentation needs to be added to the case.

Organization	Name	Gr
System / Army / Active / Defense Military Pay Offices / 48	cletus, mr	

Phone	E-Mail
no	no

Action/Comments*

Please process this case on Mr. Doo Dee.

Action

Refer case to System / Army / Active / DFAS-IN Army Military Pay Oper   Choose...   Refer

Case Type - TSP

Use IF the Thrift Savings Plan withholding is in error or it is b

Please attach TSP Form.

Refers to the CMS user performing the action/comment.

Input Point

Organization
System / Army / Active / Defense Military Pay Offices / 4{

Name
clotus, mr

Grade

Phone
no

E-Mail
no

Action/Comments*

Please process this case on Mr. Doo Dee.

Please do not provide this information to the customer. If you contact the person directly be sure to annotate it in the Action/Comments box.

Refer case to System / Army / Active / DFAS-IN Army Military Pay Oper   Choose...   Refer

DFAS

Case Type - TSP

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

Organization
System / Army / Active / Defense Military Pay Offices / 48

Name
cletus, mr

Grade

Phone
no

E-Mail
no

Action/Comments*

Please process this case on Mr Doe Doe

Describe exactly what needs be done, and or, what you have done in the case

Must be specific and clear;
Avoid usage of acronyms, all caps and attitude.

Action

Refer case to System / Army / Active / DFAS-IN Army Military Pay Ope | Choose... | | Refer |

"Action" Field

Select the "Choose" button first to indicate where.

Specify where the case is being sent to work.

Select Organization

Select Organization

"Back" Button takes organizational structure to higher level.

Case Management System
F12-02(TRNG Build 2)

Menu: CMS Home | Reports | Change Password | Log Out

MPO Ft. Irwin

Case Management System - Select Organization

Organizations

System	System	Back
Branch	Army	Back
Component	Active	Back
DMPO	Defense Military Pay Offices	Back
Select	4836 DMPO Ft. Irwin	More...

Ok Cancel

Find an Organization

ADSN: [   ] Organization Name: [   ]

Find Organization

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Case Management System
F12-02(TRNG Build 2)

Provides additional choices for that organizational level.

"More" provides next lower level of organizational structure.

Organizations

System	System	Back
Branch	Army	Back
Component	Active	Back
DMPO	Defense Military Pay Offices	Back
Select	4836 DMPO Ft. Irwin	More...

Ok   Cancel

Select Ok to return to the case for final review and referral

Find an Organization

Organization Name: [   ]

Find Organization

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Case Management System
F12-02(T

DMPO Ft. Irwin

Menu

Case

Organ

Asterisk used as wild card

Type the Organization's name and select Find Organization Button.

System	System	Back
Branch	Army	Back
Component	Active	Back
DMPO	Defense Military Pay Offices	Back
Select	4836 DMPO Ft. Irwin	More...

Ok Cancel

Find an Organization

ADSN: [   ] Organization Name: [*Separations*]

Find Organization

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Select Organization – Search Function

Case Management System
F12-02(TRNG Build 2)

Menu: **CMS Home** | **Reports** | **Change Password** | **Log Out**   Ft. Irwin

Case Management System - Select Organization

System	System	
Branch	Army	Back
Component	Active	Back
DMPO	Defense Military Pay Offices	Back
Select	4836 DMPO Ft. Irwin	

[Ok] [Cancel]

Organization's will appear in as a hyperlink in blue.

Select the organization that will work the case.

Find an Organization

ADSN: [   ]   Organization Name: [*Separations*]

[Find Organization]

ADSN	Organization Name
3831S0	System / Army / Active / DFAS-IN Army Military Pay Operations / C.P.D. / DFAS General Processing I / Separations
481008	System / Army / Active / Defense Military Pay Offices / 4810 DMPO Ft. Sill / 4810 Ft. Sill Separations
481706	System / Army / Active / Defense Military Pay Offices / 4817 DMPO Ft. Richardson / 4817 Ft. Richardson Separations
481806	System / Army / Active / Defense Military Pay Offices / 4818 DMPO Ft. Wainwright / 4818 Ft. Wainwright Separations
482406	System / Army / Active / Defense Military Pay Offices / 4824 DMPO Ft. Bliss / Separations
483006	System / Army / Active / Defense Military Pay Offices / 4830 DMPO Ft. Lewis / 4830 Ft. Lewis Separations
483406	System / Army / Active / Defense Military Pay Offices / 4834 DMPO Ft. Hood PPC / 4834 Ft. Hood PPC Separations
483506	System / Army / Active / Defense Military Pay Offices / 4835 DMPO Ft. Jackson / 4835 Ft. Jackson Separations
483606	System / Army / Active / Defense Military Pay Offices / 4836 DMPO Ft. Irwin / 4836 Ft. Irwin Separations
483706	System / Army / Active / Defense Military Pay Offices / 4837 DMPO Ft. Stewart / Separations
483806	System / Army / Active / Defense Military Pay Offices / 4838 DMPO APG / 4838 APG Separations
483906	System / Army / Active / Defense Military Pay Offices / 4839 DMPO Ft. Lee / 4839 Ft. Lee Separations
484406	System / Army / Active / Defense Military Pay Offices / 4844 DMPO Ft. Knox / 4844 Ft. Knox Separations
484506	System / Army / Active / Defense Military Pay Offices / 4845 DMPO Ft. Gordon / 4845 Ft. Gordon Separations
3831K9	System / Army / Active / DFAS-IN Air Force Military Pay Operations / Separations

Select Organization – Search Function

Case Management
F12-02(TRNG

Organizational tree will automatically adjust to hyperlink selected

Menu: CMS Home | Reports | Change Password | Log Out

Case Management System - Select Organization

Organizatio

System	System	Back
Branch	Army	Back
Component	Active	Back
DFAS Agency	DFAS-IN Army Military Pay Operations	Back
DFAS Agency	C.P.D.	Back
DFAS Agency	DFAS General Processing I	Back
Select	Separations	More...

Ok   Cancel

Select Ok to return to the case for final review and referral

Find an Organization

Organization Name: [ ]

Find Organization

	/ DFAS General Processing I / Separations	
	ill / 4810 Ft. Sill Separations	
	ichardson / 4817 Ft. Richardson Separations	
	ainwright / 4818 Ft. Wainwright Separations	
482406	System / Army / Active / Defense Military Pay Offices / 4824 DMPO Ft. Bliss / Separations	
483006	System / Army / Active / Defense Military Pay Offices / 4830 DMPO Ft. Lewis / 4830 Ft. Lewis Separations	
483406	System / Army / Active / Defense Military Pay Offices / 4834 DMPO Ft. Hood PPC / 4834 Ft. Hood PPC Separations	
483506	System / Army / Active / Defense Military Pay Offices / 4835 DMPO Ft. Jackson / 4835 Ft. Jackson Separations	
483606	System / Army / Active / Defense Military Pay Offices / 4836 DMPO Ft. Irwin / 4836 Ft. Irwin Separations	
483706	System / Army / Active / Defense Military Pay Offices / 4837 DMPO Ft. Stewart / Separations	
483806	System / Army / Active / Defense Military Pay Offices / 4838 DMPO APG / 4838 APG Separations	
483906	System / Army / Active / Defense Military Pay Offices / 4839 DMPO Ft. Lee / 4839 Ft. Lee Separations	

"Action" Field

Case Type - TSP

Use IF the Thrift Savings Plan withholding is in error or it is being credited to the wrong account.

Please attach TSP Form.

Input Point

Organization
System / Army / Active / Defense Military Pay Offices / 4$

Name
cletus, mr

Grade

Phone
no

E-Mail
no

Action/Comments*
Please process this case on Mr. Doo Dee.

Action

Refer case to | System / Army / Active / DFAS-IN Army Military Pay Ope | Choose... | Refer

Select "Refer" to send the case to another organization.

Attach a Supporting Document

Case Management System
F12-02(TRNG Build 2)

Menu: CMS Home | Reports | Change Password | Log Out

Success!
You have **entered** the following new case...

Case: **#3684893**
Case Type: **TSP**
Customer: **Doo Dee**
Created On: **04/18/2012 02:56 PM**

Would you like to...
- Add attachments to this case
- Create or review another case (return to CMS Home)

Note: Do not click on the back button and click submit again
Doing so will create another record.

THIS S

Click on "Add Attachments to this Case"

There are no limitations in the # of supporting documents that can be attached to a case. There is a size limitation of 5 Meg for each document.

Attach a File

To find the Document click on "Browse"

Attach File

Locate File to be Attached

Click on "Open"

Attach the File

After File is Selected Click "OK"

File Attached

Case Management System
F12-02(TRNG Build 2)

» File attached successfully.

Success!
You have **entered** the following new case...

Case: #3684893
Case Type: TSP
Customer: Doo Dee
Created On: 04/18/2012 02:56 PM

Would you like to...
- Add attachments to this case
- Create or review another case (return to CMS Home)

Note: Do not click on the back button and click submit again.
Doing so will create another record.

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Click on "Create or Review another case (return to CMS Home)"
once the file is attached successfully

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